

## BILL TO CUSTOMER BY SALES ORDER TRANSACTION

AcuSObillto customer enhancement allows for entry of a Bill-to Customer for each sales order or sales invoice transaction. The Open Order and AR Balances, AR Terms, and Payment Processing settings of the Bill-to Customer will be used for the sales transaction.

### BILL TO CUSTOMER BY SALES TRANSACTION

- **Bill to Customer Setting.** Ability to set for each customer record the selected customers, any customer or a specific customer as the option for the entry of bill-to customer in sales order and invoice transactions.
- **Bill to Customer Entry for SO Transaction.** Ability to enter for each Sales Order and Sales Invoice transaction the Bill-to Customer to be used for AR processing.

### UPDATING OF AR BALANCES FOR BILL TO CUSTOMER

- **Update SO Balance for the Bill-to Customer.** Update bill-to customer's Open Order balance for the processed sales transaction.

### AR REPORTING BASED ON BILL TO CUSTOMER

- **AR Reporting Based on Bill-to Customer Setting.** AR Ageing, Customer Details and AR Balances by Customers reports and inquiries will display transactions taking into account the bill-to customer enter on the sales order or sales invoice transaction.

### KEY BENEFITS

#### BILL TO BY SALES TRANSACTION

- Ability to set the AR Bill-To Customer by sales order or sales invoice transaction
- Ability to set for each customer the bill-to customers

#### AR MANAGEMENT BASED ON SALES ORDER BILL-TO CUSTOMER

- Credit approve sales orders based on bill-to customer's terms and credit limit
- View AR Balances, Customer Detail and Aging taking into account the Bill-to Customer of the sales order transaction

#### PAYMENT PROCESSING

- Display sales documents taking into account the bill-to customer of the sales order transactions

The screenshot displays the Acumatica software interface. The top section shows a 'Sales Orders' window for 'SO - US...'. It includes fields for Order Type (SO), Order Nbr., Status (Open), Date (7/7/2021), Requested On (7/7/2021), Customer, Location (MAIN - Primary Location), Contact, Bill-To Customer, Currency, and Project. A 'Select - Bill-To Customer' dialog box is open, showing a list of customers with columns for Customer ID, Customer Name, Address Line 1, and Address Line 2. The selected customer is 'ABCHOLDING - ABC Holdings Inc' with address '65 Broadway'. Below this, another window shows 'Customer Details' for 'ABARTENDE - USA Bartending School', including Customer ID, Customer Status (Active), Customer Class (KEY - Key Customers), Balance (199,195.00), Payment Balance (0.00), and Related Balance (0.00). The bottom section shows 'BILL-TO ADDRESS' and 'SALES ORDER MANAGEMENT' options, including 'ADDRESS LOCKUP', 'Parent Account', and checkboxes for 'Consolidate Balance', 'Consolidate Statements', and 'Share Credit Policy'.

## BILL TO CUSTOMER BY SALES ORDER FEATURES AND CAPABILITIES

<b>Allowed Bill-to Customer setting for each Customer</b>	Set for each customer record, a range of customers, a specific customer or any customers as allowed bill-to customer for sales orders.
<b>Ability to set a bill-to customer for sales order transactions</b>	Ability to set for each sales order a different bill-to customer based on the setting in the sales order customer's bill-to customer setting.
<b>Use Bill-to Customer's Terms and Payment Method</b>	Set sales transaction's terms and payment method form the bill-to customer record.
<b>Use of Bill-to Customer's Credit Limit and Hold Status</b>	Use bill-to customer's Credit Limit and Credit Hold settings during credit approval process of the sales orders.
<b>Open Order Balance Management</b>	Updating of Bill-to Customer's Open Order Balance for the processed sales order.
<b>Create Payment is Processed for the Bill-to Customer</b>	Bill to Customer is loaded during the Create Payment Action for the sales order. Bill-to Customer balance is updated for the payment.
<b>Bill-to Customer Functionality in Sales Invoices</b>	Ability to set for each sales invoice a different bill-to customer based on the setting in the customer's bill-to customer setting.
<b>Payment Term and Balance Updating for Bill-to Customer</b>	Support for credit term and balance updating for the bill-to customer for sales invoices processed.
<b>Payment and Applications</b>	Payments and Applications form loads documents for the customer taking into account bill-to customer setting for sales & invoice transactions.
<b>Customer Details</b>	Customer Details page displays documents taking into account the bill-to customer setting for all sales and invoice transactions processed.
<b>A/R Aging Report</b>	AR Aging Report prints documents taking into account the bill-to customer setting for all sales and invoice transactions processed.
<b>AR Balances by Customer</b>	AR Balances by Customer Report prints documents taking into account the bill-to customer setting for all sales and invoice transactions processed.
<b>AR Statements</b>	The AR Statement printing has not been modified to take into account bill-to customer setting for transactions processed at this time.

### THE ACUMATICA ERP DIFFERENCE

Acumatica delivers a full suite of integrated business management applications unlike any other ERP solution today.

#### STREAMLINE OPERATIONS

**Manage your business more efficiently:**

- Automate processes
- Control workflows
- Access the system from anywhere on any device – including mobile
- Promote collaboration with all-inclusive user licensing

#### ADAPTABLE SOLUTION

**Add and extend:**

- Deploy in-house or in a private or public cloud
- Easily configure your solution to fit your needs
- Add capabilities such as CRM or data visualization at any time
- Extend to other solutions and applications beyond ERP

#### YOUR BUSINESS ACCELERATED

- Accelerate business performance and make smarter decisions with automated processes, real-time data collection, financial analyses, and forecasting
- No per user pricing – system scales as your business grows